

U.S. House of Representatives
Committee on Ethics

LEGISLATIVE RESOURCE CENTER

2015 JUN 11 AM 11:33

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

EMPLOYEE POST-TRAVEL DISCLOSURE FORM

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual Financial Disclosure Statements of those employees required to file them. In accordance with House Rule 25, clause 5, you must complete this form and file it with the Clerk of the House, 135 Cannon House Office Building, within 15 days after travel is completed. Please do not file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Roger Jackson
2. a. Name of accompanying relative: _____ or None ☒
b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates of departure and return: Departure: 5/27/15 Return: 5/29/15
b. Dates at personal expense (if any): _____ or None ☒
4. Departure city: PHL Destination: SFO Return city: PHL
5. Sponsor(s) (who paid for the trip): I. T. I. F.
6. Describe meetings and events attended: Visits to multiple tech industry headquarters to learn of their work and plans for innovation.
7. Attached to this form are EACH of the following (signify that each item is attached by checking the corresponding box):
 - a. ☒ a completed Sponsor Post-Travel Disclosure Form;
 - b. ☒ the Primary Trip Sponsor Form completed by the trip sponsor prior to the trip, including all attachments and Grantmaking or Non-Grantmaking Sponsor Forms;
 - c. ☒ page 2 of the completed Traveler Form submitted by the employee; and
 - d. ☒ the letter from the Committee on Ethics approving my participation on this trip.
8. a. I represent that I participated in each of the activities reflected in the attached sponsor's agenda. (Signify that statement is true by checking box): ☒
b. If not, explain: _____

I certify that the information contained on this form is true, complete, and correct to the best of my knowledge.

SIGNATURE OF TRAVELER: RJ DATE: 6/11/15

I authorized this travel in advance. I have determined that all of the expenses listed on the attached Sponsor Post-Travel Disclosure form were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

NAME OF SUPERVISING MEMBER: Chaka Fattah DATE: 6/11/15

SIGNATURE OF SUPERVISING MEMBER: Chaka Fattah

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U.S. House of Representatives
Committee on Ethics

☒ Original ☐ Amendment

SPONSOR POST-TRAVEL DISCLOSURE FORM

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. *A completed copy of the form must be provided to each House Member, officer, or employee who participated on the trip within 10 days of their return.* You must answer all questions, and check all boxes, on this form for your submission to comply with House rules and the Committee's travel regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Sponsor(s) (who paid for the trip): Information Technology and Innovation Foundation

2. Travel Destination(s): San Francisco and Palo Alto, CA

3. Date of Departure: May 27, 2015 Date of Return: May 29, 2015

4. Name(s) of Traveler(s): Roger Jackson

(NOTE: You may list more than one traveler on a form only if all information is identical for each person listed.)

5. **Actual amount** of expenses paid on behalf of, or reimbursed to, each individual named in response to Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Other Expenses (dollar amount per item and description)
Traveler	\$645	\$660	\$149	
Accompanying Relative				

6. All expenses connected to the trip were for actual costs incurred and not a *per diem* or lump sum payment. (Signify statement is true by checking box): ☒

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Julie Whisman

Name: Jackie Whisman

Title: Director of Development and Outreach

Organization: Information Technology and Innovation Foundation

I am an officer of the above-named organization (signify statement is true by checking box): ☒

Address: 1101 K Street, NW, Suite 610, Washington, DC 20005

Telephone number: (202) 626-5748

Email Address: jwhisman@itif.org

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at (202) 225-7103.

U.S. House of Representatives
Committee on Ethics

TRAVELER FORM

1. Name of Traveler: Roger Jackson
2. Sponsor(s) (who will be paying for the trip): Information Technology & Innovation Foundation
3. Travel destination(s): San Francisco, CA
4. a. Date of departure 5/27/15 Date of return: 5/29/15
b. Will you be extending the trip at your personal expense? ☐ Yes ☒ No
If yes, dates at personal expense: _____
5. a. Will you be accompanied by a relative at the sponsor's expense? ☐ Yes ☒ No
b. If yes:
(1) Name of accompanying relative: _____
(2) Relationship to traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
(3) Accompanying relative is at least 18 years of age: ☐ Yes ☐ No
6. a. Did the trip sponsor answer "yes" to Question 9(d) on the Primary Trip Sponsor Form (*i.e.*, travel is sponsored by an entity that employs a registered federal lobbyist or foreign agent and you are requesting lodging for two nights)? ☐ Yes ☒ No
b. If yes, explain why the second night of lodging is warranted:

7. Primary Trip Sponsor Form is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: ☒ Yes ☐ No
NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.
Congressman Fattah is Ranking Member on the Appropriations
Subcommittee on Commerce, Justice, and Science. As his Chief of
Staff, it is my responsibility to advise him on Tech-related issues.
9. Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, and/or arranging the trip? ☐ Yes ☒ No

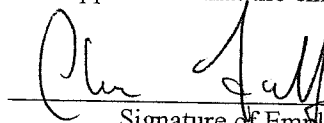
10. **FOR STAFF TRAVELERS:**

TO BE COMPLETED BY YOUR EMPLOYING MEMBER:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Date: 4/22/15



Signature of Employing Member

U.S. House of Representatives
Committee on Ethics

PRIMARY TRIP SPONSOR FORM

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a Traveler Form at least 30 days before the start date of the trip. The trip sponsor should NOT submit the form directly to the Committee. The Committee Web site (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor (who will be paying for the trip):
Information Technology and Innovation Foundation (ITIF)
2. I represent that the trip will not be financed (in whole or in part) by a registered federal lobbyist or foreign agent (signify that the statement is true by checking box): ☒
3. Check only one: I represent that:
 - a. the primary trip sponsor has not accepted from any other source funds intended directly or indirectly to finance any aspect of the trip ☒ or
 - b. the trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds ☐ or
 - c. the primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. ☐If "c" is checked, list the names of the additional sponsors:
4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary):
See Attachment 1
5. Is travel being offered to an accompanying relative of the House invitee(s)? ☐ Yes ☒ No
6. Date of departure: May 27, 2015 Date of return: May 29, 2015
7. a. City of departure: Washington, DC
b. Destination(s): San Francisco, CA
c. City of return: Washington, DC
8. I represent that (check one of the following):
 - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: ☐ or
 - b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: ☒ or
 - c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event and lobbyist/foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations. ☐
9. Check one of the following:
 - a. I checked 8(a) or (b) above: ☒
 - b. I checked 8(c) above but am not offering any lodging: ☐
 - c. I checked 8(c) above and am offering lodging and meals for one night: ☐ or
 - d. I checked 8(c) above and am offering lodging and meals for two nights: ☐If "d" is checked, explain why the second night of lodging is warranted:

10. Attached is a detailed agenda of the activities the House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees) (indicate agenda is attached by checking box): ☒
11. Check one:
- I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify that the statement is true by checking box): ☒ *or*
 - N/A – trip sponsor is a U.S. institution of higher education. ☐
12. For each sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip and its role in organizing and/or conducting the trip:
See Attachment 2

13. Answer parts a and b. Answer part c if necessary.
- Mode of travel: Air ☒ Rail ☐ Bus ☐ Car ☐ Other ☐ (Specify: _____)
 - Class of travel: Coach ☒ Business ☐ First ☐ Charter ☐ Other ☐ (Specify: _____)
 - If travel will be first class or by chartered or private aircraft, explain why such travel is warranted:

14. I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). (signify that the statement is true by checking box): ☒
15. I represent that either (check one of the following):
- The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees: ☐ *or*
 - The trip involves events that are arranged specifically *with regard* to congressional participation: ☒
 If "b" is checked:
 - Detail the cost per day of meals (approximate cost may be provided): _____
 Approximate cost of \$55 per day
 - Provide reason for selecting the location of the event or trip: _____
See Attachment 3

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- Hotel name: Sheraton City: Palo Alto, CA Cost per night: \$289
 Reason(s) for selecting: Cost, availability, proximity to meetings and events
- Hotel name: _____ City: _____ Cost per night: _____
 Reason(s) for selecting: _____
- Hotel name: _____ City: _____ Cost per night: _____
 Reason(s) for selecting: _____

17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. (signify that the statement is true by checking box): ☒

18. **TOTAL EXPENSES FOR EACH PARTICIPANT:**

<input type="checkbox"/> actual amounts <input checked="" type="checkbox"/> good faith estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or employee	\$550	\$580	\$133
For each accompanying relative			

	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or employee		
For each accompanying relative		

**NOTE: Willful or knowing misrepresentations on this form
may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.**

19. Check one:

- a. I certify that I am an officer of the organization listed below. ☒ or
b. N/A – sponsor is an individual or a U.S. institution of higher education. ☐

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒

21. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Jackie Whisman

Name: Jackie Whisman

Title: Director of Development and Outreach

Organization: Information Technology and Innovation Foundation

Address: 1101 K Street, NW, Suite 610, Washington, DC 20005

Telephone number: (202) 626-5748

Email address: jwhisman@itif.org

If there are any questions regarding this form please contact the Committee at the following address:

Committee on Ethics
U.S. House of Representatives
1015 Longworth House Office Building
Washington, DC 20515
(202) 225-7103 (phone)
(202) 225-7392 (general fax)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM – HOUSE ATTACHMENTS

ITIF Education Series Staff Trip to San Francisco and Palo Alto, CA – May 27 – 29, 2015

ATTACHMENT 1 – Question 4:

Allbrooks	Steve	Office of Congresswoman Marsha Blackburn
Allmayer	Josh	Office of Senator Jerry Moran (KS)
Andres	Gary	House Committee on Energy & Commerce
Barlow Richardson	Michelle	Office of Senator Roger Wicker
Baum	Ray	Office of Congressman Greg Walden
Bayer	Mark	Office of Senator Ed Markey
Bornstein	Rachael	Office of Congresswoman Suzanne Bonamici
Cardinal	Jon	Office of Senator Kirsten Gillibrand
Carroll	Jeff	House Committee on Energy & Commerce
Chambers	Glen	Office of Senator Roy Blunt
Cline Amin	Stacy	Senate Committee on Health, Education, Labor, and Pensions
Cohen	Lisa B.	Office of Congresswoman Diana L. DeGette
Cummins	Kevin	Office of Senator Tom Udall
Day	Chris	Office of Senator Bill Nelson
Dearborn	Rick	Office of Senator Jeff Sessions
Decker	Sara	Office of Senator Marco Rubio
Decker	James	Office of Congressman Michael Burgess
DeGraff	Kenneth	Office of Congresswoman Nancy Pelosi
DeWitt	Brett	Cybersecurity Subcommittee, House Committee on Homeland Security
Dufault	Graham	House Committee on Energy & Commerce
Dwyer	Julie	Office of Senator Claire McCaskill
Dziengelski	Scott M.	Office of Congressman Tim Murphy
Esparza	Chris	Office of Congressman Jason Chaffetz
Farrah	Jeffrey	Senate Committee on Commerce, Science, and Transportation
Fleet	Jamie	Office of Senator Maria Cantwell
Froelich	Melissa	Office of Congressman Michael C. Burgess
Goodstein	Sam	Office of Senator Sheldon Whitehouse
Grassmeyer	Tyler	Office of Senator Ben Sasse
Grote	Matt	Senate Committee on Homeland Security and Governmental Affairs (Minority)
Grotto	Andrew	U.S. Department of Commerce
Guarascio	Tiffany	Office of Congressman Frank Pallone
Guvensoylar	Burak	Office of Congressman Randy Forbes
Harrington	Megan	Office of Senator Rob Portman (OH)
Huckleberry	Chris	Office of Congressman Kurt Schrader
Isakovic	Jason M.	Office of Congressman Bob Latta
Isakowitz	Mark	Office of Senator Rob Portman
Jackson	Roger	Office of Representative Chaka Fattah
Jafari	Beth	Office of Senator John Cornyn
Kalyanam	Aruna	Subcommittee on Select Revenue Measures, House Ways & Means Committee
Karvelas	Dave	Office of Congressman Vern Buchanan
Kearns	Jason	House Subcommittee on Trade

Keeley	Joe	House Subcommittee on Courts, Intellectual Property, & the Internet
Kozeny	Jill	Office of Senator Chuck Grassley
Kroese	Daniel	Office of Congressman John Ratcliffe
Lin	Betsy	Office of Senator Mazie Hirono
Lynch	Josh	Office of Senator Deb Fischer
Mahan	Roger	Office of Majority Leader Kevin McCarthy
Mark	Rebecca	Office of Congresswoman Cathy McMorris Rodgers
Martinez	Alberto	Office of Senator Marco Rubio
McBride	Jessica	U.S. Senator John Thune
McKenna	William (Liam)	Senate Committee on Homeland Security and Governmental Affairs
McMillin	Bobby	U.S. Senate HELP Committee
Mitchell	Pete	Office of Senator Bill Nelson
Murphy	Rick	Office of Senator Kelly Ayotte
Neugebauer	Dale	Office of Congressman Darrel Issa
Novascone	Todd	Office of Senator Jerry Moran
Palisi	Annie	Office of Congressman John Boehner
Pawlow	Jonathan	Office of Congressman Adam Smith
Pennington	Meghan	Office of Senator Tom Carper (DE)
Pfrang	Steve	Office of Congressman Tom Reed
Phillips	T. Clay	Office of Congresswoman Kathy Castor
Plack	Brendon F.	Office of Senator John Thune
Porter	Rob	Office of Senator Orrin Hatch
Quinalty	David	Senate Commerce Committee
Rogin	Joshua	Office of Congressman Ted Deutch
Rubiner	Laurie	Office of Senator Richard Blumenthal
Ruckert	Lynnel	Office of Congressman Steve Scalise
Rudolph	Trevor	Office of Management and Budget
Sallet	Jonathan	Federal Communications Commission
Sarley	Chris	Office of Congressman John Shimkus
Satalin	Patrick	Office of Peter Welch
Schmidt	Aaron	Office of Congresswoman Suzan DelBene
Shields	Brendan	House Committee on Homeland Security
Slevin	Chris	Office of Senator Cory Booker
Smith	Jonathan	Office of Congressman Derek Kilmer
Strickland	Kelle A.	Rep. Michael Burgess
Thompson	Ryan	Office of Congressman Joe Barton
Tolar	Helen	Office of Senator John Boozman
Trusty	Olivia	House Subcommittee on Commerce, Manufacturing & Trade
Van Beek	Jason	U.S. Senate Commerce Committee
Victor	Kyle	Office of Congresswoman Doris Matsui
Volante	Monica	Office of Congressman Joe Pitts
Walsh	Tim	Office of Congressman Juan Vargas
Weatherford	Austin	Office of Congressman Adam Kinzinger
Weiner	Matt	Office of Congresswoman Susan Davis
White	Jayne	Senate Committee on Finance

Winer	Andy	Office of Senator Brian Schatz
Yonkura	Ray	Office of Congressman Jim Jordan
Zulkosky	Eric	Office of the Majority Whip

ATTACHMENT 2 – Question 12:

ITIF is a non-partisan think tank whose mission is to formulate and promote public policies to advance technological innovation and productivity. Recognizing the vital role of technology in ensuring American prosperity, ITIF focuses on innovation, productivity and digital economy issues. Our interest in the trip is to help staff better understand how new technologies and technology applications are developing and what the trends are likely to be in the future, so that they can better understand and respond to the technological challenges facing our nation.

ITIF is a 501(c)(3) nonprofit organization founded in 2006; the organization is co-chaired by former members of Congress Vic Fazio and Phil English, and governed by a board of distinguished IT and innovation policy leaders and experts. Senators Mark Warner and Orrin Hatch are the Foundation's Honorary Senate Co-Chairs, and Congresswoman Anna Eshoo and Congressman Darrell Issa are the Foundation's Honorary House Co-Chairs.

This trip is part of the "ITIF Education Series" – a set of regular trips with Members of Congress and/or senior House and Senate staff to high-tech and innovation hubs around the country to hear from company leaders about new developments and issues, and to participate in educational forums on IT and innovation policy issues.

ITIF is the sole sponsor, and is organizing and executing all aspects of this trip.

ATTACHMENT 3 – Question 15:

ITIF has selected San Francisco and Palo Alto, California for this trip because the region is the leading innovation and technology center in the United States. This trip will give staff the opportunity to see actual technology demonstrations and presentations by top technology leaders.

Charles W. Dent, Pennsylvania
Chairman

Linda T. Sánchez, California
Ranking Member

Patrick Meehan, Pennsylvania
Frey Gowdy, South Carolina
Susan W. Brooks, Indiana
Kenny Marchant, Texas

Michael E. Capuano, Massachusetts
Yvette D. Clarke, New York
Ted Deutch, Florida
John B. Larson, Connecticut



ONE HUNDRED FOURTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Joanne White
Administrative Staff Director

Clifford C. Stoddard, Jr.
Counsel to the Chairman

Daniel J. Taylor
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515 6328
Telephone: (202) 225-7103
Facsimile: (202) 225-7392

May 20, 2015

Mr. Roger Jackson
Office of the Honorable Chaka Fattah
2301 Rayburn House Office Building
Washington, DC 20515


Dear Mr. Jackson:


Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to San Francisco, California, scheduled for May 27 to 29, 2015, sponsored by the Information Technology and Innovation Foundation (ITIF).

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$375 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,


Charles W. Dent
Chairman


Linda T. Sánchez
Ranking Member

CWD/LTS:kd